Case Initiation

Enter CSI at the Next (hop) line and press <ENTER>.

```
MITTSJ37   UCIJPVK                     UCSGEN Environment                 TEST
                                    Case Initiation                    5/25/05
                   Court: P 13  13 CALHOUN COUNTY
Juv File Or Case #: 2002 _____

             Type: __                                CTN Nbr: _____

     Juv Case Year: ____ if Different than Current Year

            Ticket: _




F3=Exit  F10=Name  F13=Cmds  F16=Calc
```

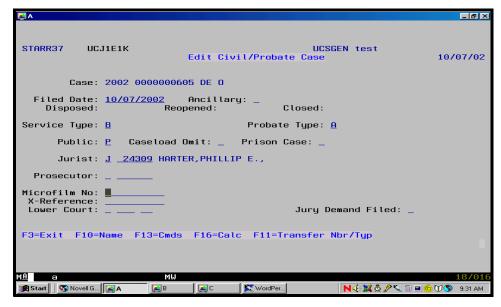|	
Court:	Defaults to user's court and county number
Juvenile File or Case#:	Year and number of case. Leave blank for automatic numbering (year will default the current year)
Case Type:	This will determine what screens will be displayed during case initiation (civil/probate or criminal/juvenile).
CTN Nbr:	Optional for criminal cases.
Ticket:	"Y" for ticket fast track or leave blank (criminal/juvenile)

Once complete - Press **<ENTER>**

Case initiation will proceed through each screen necessary to create a case

First Screen - **Edit Civil/Probate Case**

We recommend that you enter the filed date (mandatory) , service type, probate type, and jurist

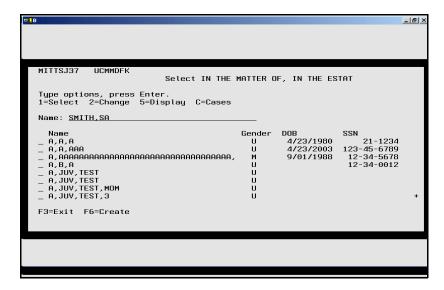| Filed Date:	Defaults to today's date.
Ancillary:	"A" for circuit court filings that are ancillary cases
Service Type	Required for probate reports to track inventories and accounts
Probate Type	Required for probate reports to track adult (A) or minor (M) if a guardianship or conservatorship case. An indicator in decedent estates to indicate whether the estate is testate (T) or intestate (I).
Public	Indicates if the case is public or non public (To indicate that a case is non-public, the case number will be highlighted)
Caseload Omit	Used when a case is entered onto the system, but should not be counted on caseload pursuant to SCAO caseloac instructions.
Jurist:	Jurist of record

Once complete - Press **<ENTER>**

Second screen - Select IN THE MATTER OF, IN THE ESTATE OF

```
MITTSJ37    UCMMDFK
                    Select IN THE MATTER OF, IN THE ESTAT

Type options, press Enter.
1=Select  2=Change  5=Display  C=Cases

Name: SMITH,SA_____

  Name                              Gender  DOB        SSN
_ A,A,A                               U      4/23/1980    21-1234
_ A,A,AAA                             U      4/23/2003 123-45-6789
_ A,AAAAAAAAAAAAAAAAAAAAAAAAAAAAAAAA,  M      9/01/1988  12-34-5678
_ A,B,A                               U                 12-34-0012
_ A,JUV,TEST                          U
_ A,JUV,TEST                          U
_ A,JUV,TEST,MOM                      U
_ A,JUV,TEST,3                        U                           +

F3=Exit  F6=Create
```

Type the LAST NAME, FIRST INITIAL (do not use spaces) at the Name: line and press **<ENTER>**

The system will search for the name and position to the closest name match

If the name is not found in the name index <F6> to create.

```
MITTSJ37    UCMMDFK
                    Select IN THE MATTER OF, IN THE ESTAT

Type options, press Enter.
1=Select  2=Change  5=Display  C=Cases

Name: SMITH,SA_____

  Name                              Gender  DOB        SSN
_ SMITH,SAMUAL,ADAM,                  M     12/12/1929
_ SMITH,SARAH,                        F
_ SMITH,SASHA,                        U
_ SMITH,SASHA,                        U
_ SMITH,SHAUN,                               1/01/1980
_ SMITH,SIX,                          F      5/10/1994
_ SMITH,STAN,                         M      5/01/1997
_ SMITH,STELLA,                       F                           +

F3=Exit  F6=Create
```

Third Screen - **Edit Name**

```
[⬛❚B]                                                             [_][⊡][X]

  MITTSJ37    UCC6E1K                    UCSGEN Environment                  TEST
                                           Edit Name                      5/25/05
          Name: SMITH,SAMUEL_____    Adoption Name: N
       Company: N

        Gender: M          Race: WA
           SSN: _____
  Date of Birth: _____              Date of Death: _____

           DLN: _____  St: __

       Address: _____

          City: _____ St: __ Zip: _____
         Phone: _____ Ext: _____
           Fax: _____

          SID#: _____    NCIC#: _____



  F3=Exit  F10=Name  F13=Cmds  F16=Calc
```

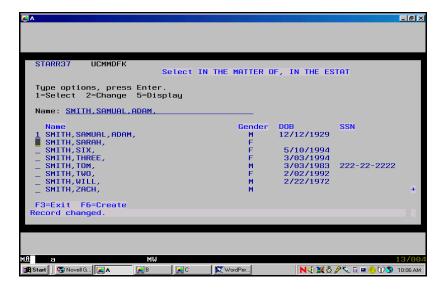|	
Name:	Full name of a party, LASTNAME,FIRSTNAME, (requires two commas, no spaces). Company names require no commas and should be designated with a "Y"
Adoption Name:	If "Y" the name will only be visible in the adoption file and to users with adoption authority
Gender:	Male/Female/Unknown
Race:	Prompt for options
SSN:	Social Security Number (Optional)
Date of Birth:	Birth Date, should be completed if available, necessary for reports involving minors
Date of Death:	Informational for Estates
DLN:	Driver's License Number and State
Address:	Party's address
Phone:	Party's phone number
SID#:	State Identification Number. Used for criminal cases
NCIC#:	Federal Identification Number - Primarily used for criminal cases

Once completed - Press **<ENTER>**

Fourth Screen - Edit Civil/Probate Case

Now that the name has been added to the name index, you will need to select their name (1 next to the name) to add it as the header party on the case. Press <ENTER>.
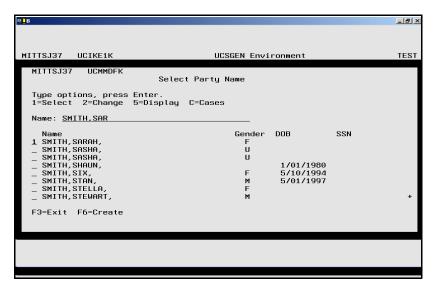
The Edit Party Screen is returned

Fifth Screen - Edit Party

If there is any other information you want to add regarding this party, such as attorney information, if this party receives notices, alternate names, etc., you may do so now. Once completed, press <ENTER>.

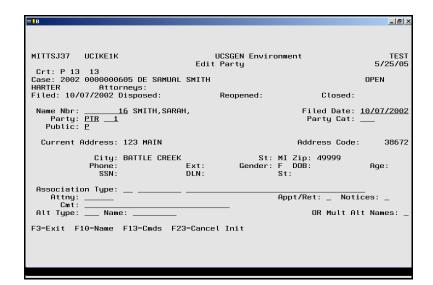## Sixth Screen - Select Party Name - Additional Parties

```
MITTSJ37    UCIKE1K                    UCSGEN Environment              TEST

  MITTSJ37    UCMMDFK
                            Select Party Name

  Type options, press Enter.
  1=Select   2=Change   5=Display   C=Cases

  Name: SMITH,SAR_____

    Name                          Gender  DOB          SSN
  1 SMITH,SARAH,                     F
  _ SMITH,SASHA,                     U
  _ SMITH,SASHA,                     U
  _ SMITH,SHAUN,                             1/01/1980
  _ SMITH,SIX,                       F       5/10/1994
  _ SMITH,STAN,                      M       5/01/1997
  _ SMITH,STELLA,                    F
  _ SMITH,STEWART,                   M                              +

  F3=Exit  F6=Create
```

Continue to add any additional parties on the case using the same process as described in screens 2, 3 and 4.

Seventh Screen - Additional Parties

When you have completed entry of this party press <ENTER>

Once you have added all parties on the case press <F3> to exit.

```
MITTSJ37    UCIKE1K                    UCSGEN Environment              TEST
                                    Edit Party                      5/25/05
 Crt: P 13  13
Case: 2002 0000000605 DE SAMUAL SMITH                               OPEN
HARTER        Attorneys:
Filed: 10/07/2002 Disposed:          Reopened:          Closed:

  Name Nbr: _____16 SMITH,SARAH,            Filed Date: 10/07/2002
    Party: PTR  _1                             Party Cat: ___
   Public: P

  Current Address: 123 MAIN                    Address Code:   38672

           City: BATTLE CREEK              St: MI Zip: 49999
           Phone:              Ext:        Gender: F  DOB:       Age:
            SSN:               DLN:             St:

  Association Type: __ _____ _____
     Attny: _____                      Appt/Ret: _  Notices: _
       Cmt: _____
  Alt Type: ___ Name: _____           OR Mult Alt Names: _

  F3=Exit  F10=Name  F13=Cmds  F23=Cancel Init
```

Eighth Screen - Edit Event

The edit event screen is used to enter specific information regarding the case, including documents filed, case dispositions, hearings and other information. Each entry will become a record in the register of actions.

```
MITTSJ37   UCIXE1K                    UCSGEN Environment              TEST
                                      Edit Event                     5/25/05

Crt: P 13  13 Jurist: HARTER       Bond:        Auth:                OPEN
Case: 2002 0000000605 DE        SAMUAL SMITH
Atty:                              Worker:
File: 10/07/2002  Dispose:           Reopen:              Close:

Evt: _____  Dte: _5/25/2005_  Plea: _____   Dsp: _____  Pgm/Rslt: ____ _ Monetary: _
Pty: ___ ___     Cnt: __     Attny: _____    Jur: _ _____    Due Dte: _____
Cmt: _____
Form: ___ _____   Register: _____   Receipt: _____   Amount: _____



Schedule Next Action:
Next: _____ Date: _____  Time: _____ _   Jur: _ _____           Ctrm: _____
 Cmt: _____
      _____

F3=Exit   F10=Name   F13=Cmds   F14=More Comments   F16=Calc   F19=PCN   F20=Bonds
```

There are fields on the Edit Event Screen that are required, depending on the type of entry you are entering.

- Reports   Event type, party filing the document and due date crucial to reports, forms, financials and scheduling may be applicable and/or required for completion in the processing of an event.

- Caseload   Event, Disposition and Party

- Forms   Event, Pgm/Rslt and Form

- Set Hearing Schedule Next Action fields

<u>Event Entry</u>

```
MITTSJ37    UCIXE1K                    UCSGEN Environment                    TEST
                                        Edit Event                          5/25/05

Crt: P 13  13 Jurist: HARTER        Bond:          Auth:              OPEN
Case: 2002 0000000605 DE        SAMUAL SMITH
Atty:                               Worker:
File: 10/07/2002  Dispose:              Reopen:              Close:

Evt: PET   Dte: 10072002    Plea: _____   Dsp: _____   Pgm/Rslt: ___ _ Monetary: _
Pty: PTR 1___    Cnt: __    Attny: _____    Jur: _ _____    Due Dte: _____
Cmt: _____
Form: ___ _____    Register: _____    Receipt: 6232_____   Amount: 100_____



Schedule Next Action:
Next: _____ Date: _____  Time: _____ _   Jur: _ _____            Ctrm: _____
 Cmt: _____
      _____

F3=Exit  F10=Name  F13=Cmds  F14=More Comments  F16=Calc  F19=PCN  F20=Bonds
```

Enter the first document on that is in the file. Check the filing date and enter any other desired information.

Once you have completed the entry, press **<ENTER>**

Continue to enter events pertaining the this case. When you have entered all of the events, **<F3> to Exit**.

You have completed case initiation.